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ABSTRACT

This trainer's guide is intended to assist supervisors of work-based career training projects in helping students develop telephone usage skills. The guide is one in a series of core curriculum modules that is intended for use in combination on- and off-the-job programs to familiarize youth with the skills, knowledge, and attitudes necessary for success in the workplace. Included in the guide are the following components: project information, a summary of the content and approach of the guide, supervisor's notes, off-the-job tutor's notes, background information, lists of tasks and core skills, an action plan that includes suggested learning activities, supervisor and trainee review sheets, and an assessment form. (MN)

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Youth Training Scheme

CORE EXEMPLAR WORK BASED PROJECT

FD265317

Taking telephone calls

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ESF
CORE SKILLS PROJECT
YTS

OTF No:1

PROJECT No: S|10

TYPE Individual

The Further Education Staff College
Coombe Lodge, Blagdon, Bristol, BS18 6RG ✆ 0761-62503

ISBN 0-948361-09-3

ASSESSMENT OF CORE SKILLS

This series of projects contains a number of different formats for recording assessment of core skills. These formats are offered for experimental purposes; none is proven as the 'best' method. All are based on the principle that feedback to trainees is a necessary part of the learning process and that such feedback should include information on core skill development.

Further work is being carried out on the methods of assessing achievement of core skills in work-based learning and of how to log such achievement on a record which trainees can take away from YTS. Some of the results of this work will be included in later MSC/ESF Core Skills Project publications.

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INTRODUCTION

WHAT ARE WORK-BASED PROJECTS?

Work-based projects are learning materials which aim to make the most of all the possibilities for developing trainees' skills, knowledge and attitudes in the workplace. They build upon everyday workplace tasks to provide experience of the whole range of YTS learning opportunities.

The projects in this series have been tested with managing agents as part of the YTS Core Project, which is jointly financed by MSC and the European Social Fund. In some cases managing agents will be able to use the projects as they are. In others they will need to be adapted to the circumstances of a particular workplace or to the aims of a particular scheme. Some managing agents will prefer to produce their own projects. For such cases these examples aim to demonstrate some principles of good design in work-based learning materials. These principles are:

To encourage trainees to learn by doing
To make the most of all the experiences which are available to trainees in the workplaces.
To start from a real task which is seen as relevant by all parties involved — trainees, workplace supervisors, trainers and off-the-job tutors.
To help trainees see the relationships between things learnt on- and off-the-job.
To base the assessment of achievement upon trainees' actual performance in tasks.
To look for all the opportunities for learning which arise from a task and, in particular, to help trainees to develop the core skills. These skills, in number, communication, problem-solving and practical activities, are used in a wide variety of tasks and are essential if trainees are to achieve competence in those tasks*. They are the skills — of finding out information, planning how to do things, overcoming difficulties and so on — which help trainees to learn more quickly in new situations, either in the same workplace, in a different one, or in the world outside work.

Such skills are required naturally by the workplace tasks in these projects and, in requiring trainees to go beyond the task itself, the projects deliberately *add* to the range of core skills which are required in an everyday working situation. This is especially important for some of the skills of communication and problem-solving which trainees are often not given the opportunity to exercise in work experience.

These principles can be incorporated in projects for all placements and for trainees of all ability levels. Although the projects in this series follow a common format, there is no single 'best' style. Nor is any special expertise in writing necessary. Good work-based projects can be produced by anyone who is determined to help trainees to exploit all of the potential for learning in work experience.

*A technical manual 'Core Skills in YTS' is currently available from MSC. It is supported by a short introductory leaflet and a practitioner's guide for supervisors. A separate manual is available on computer literacy/information technology.

PROJECT INFORMATION

SUBJECT CHOICE: "TAKING TELEPHONE CALLS"

This Project was written because 2 trainees had said during the first few weeks of their scheme that they were scared to answer the telephone at work. One trainee was just about to move into a clerical area where telephone calls are frequently received.

WHERE IT CAN BE USED/COULD BE USED:

On the occasions that the Project has been used so far, it has been in Offices associated with different departments, e.g. Accounts, Production, Training, Reception. It could either be used as an introduction in an area where the telephone is very much part of the work, or it could be used in a situation where telephone calls are only received occasionally but must be answered appropriately.

STAGE(S) IN TRAINING PROGRAMME THE PROJECT WAS/COULD BE USED:

In most cases, the Project was started during the early stages of the training programme. It is not so important that it is used at a particular stage in the overall programme, rather that it is started soon after the trainee enters an area where a phone will have to be used. It could be used to follow on from off-the-job training in answering telphone calls.

LINK UP WITH OTHER WORK-BASED PROJECTS:

This Project should be able to be used by trainees working in any OTF if they may be expected to answer a telephone extension in any part of the workplace. It links with Making Telephone Calls, Telephone Charges and Using Telephone Services, and would normally be completed as first in this series. It is particularly relevant to trainees on placements in OTF 1.

SPECIAL CIRCUMSTANCES:

When this Project was used with trainees without prior negotiation or discussion, it was less successful that when the trainee made the decision that it was appropriate to his/her needs at that time.

ADAPTATIONS/MODIFICATIONS:

Because this Project is based on the use of observation skills, it should not be difficult to ensure that it is carried out in a way appropriate to any particular workplace. It could either be used before or after the Project on "Making Telephone Calls".

USE OF OFF-THE-JOB TUTOR:

Feedback from Supervisors suggests that support from a tutor is not normally necessary for this series of Projects, although a tutor could provide further training to follow on from these Projects.

SUMMARY

TAKING TELEPHONE CALLS

This Project asks the trainee to:

observe colleagues receiving telephone calls and

note points of good telephone technique, including

being prepared; identifying yourself; using an appropriate manner and responses;

passing on calls; taking and passing on messages;

prepare a checklist and practise taking telephone calls.

SPECIAL FEATURES

Can be used in sequence with WBP NOS 013(S) 015(S) 019(S).

SUPERVISOR'S NOTES

Make sure that the trainee has the opportunity to observe several different people receiving telephone calls. This part of the Project could be spread over as long a period as necessary and fitted in with other work.

It might be advisable to let colleagues know that the trainee is likely to be watching their performance.

Dependent on the work situation, it might be helpful to identify common types of telephone calls - e.g. enquiries on particular topics - and to discuss these before the trainee starts his/her observation. You may also want to check that the trainee knows which employees deal with different types of queries. When the trainee has prepared a draft checklist, please make arrangements for him/her to practise taking calls - be prepared to offer support in the early stages.

If your firm has an established procedure for taking telephone messages, it should not be necessary to tell the trainee in advance but you should bear it in mind when reviewing his/her checklist.

Discuss the checklist with the trainee - checklists could vary widely but should be in a logical order and include the following points in some form:

Preparation:	be equipped with materials and information
Identification:	announce yourself clearly
Manner:	be polite, helpful, attentive and brief
Action:	answer the query or refer the call
Messages:	pass on a clear, complete verbal, or written message.

Make sure the trainee understands the importance of these points, but allow scope for the trainee to learn and improve by observing procedures in other work areas if it is possible to arrange this.

When the trainee has completed the Action Plan and made his/her comments, please complete the Supervisor Review Section.

NAMES

Trainee _____

Supervisor _____

TIMES

Fill in the table below. This will show the time you spend on this Project. The first column has been filled in as an example. Make another table if you need more space.

Date	9/4/84					
Start	9·30					
Finish	12·30					TOTAL
Time Spent	3 hours					

BACKGROUND 2

A firm and its employees are often judged by the way that they answer the telephone, so it is important that when you take a telephone call you give the right impression. This means being polite and helpful. Using the telephone is often quicker than writing, but telephone time costs money and should not be wasted.

SITUATION

Any work area with a telephone extension.

PURPOSES

Doing this Project will help you to learn more about your work. It will also help you to develop your Core Skills (Number, Communication, Problem Solving, Practical and Computer Literacy Skills). Increasing your competence in these skills will make it easier to learn new work skills, change jobs, and retrain when the need arises.

The activities that you will be asked to carry out are listed below, along with the main Core Skills that they contain. These Core Skills are also listed on the "Project Record" Form at the end of the Action Plan and your Supervisor should assess your achievements in these skills as you complete the Project. This record will be needed to complete your Certificate at the end of your YTS Year.

To help you to:	Core Skills:
find out how people deal with telephone calls by observing them	6.3 find out information by observing
note the different things people do when they answer the telephone	10.2 decide which category something belongs to
plan a checklist to help trainees answer the telephone correctly	9.1 plan the order of activities
take telephone calls and answer queries from callers	7.1 provide information by speaking to other people in the workplace 7.2 provide information by speaking to customers and clients
take telephone messages and pass them on in writing	7.3 provide information in writing
review your progress and check if you can improve your technique	11.1 check that he/she is performing a task to standard
use the telephone correctly	COMPUTER LITERACY: TELECOMMUNICATIONS

Please read the questions asked in the Trainee Review Section.

ACTION PLAN

Read through this Action Plan carefully before you start.

Some people you work beside will have been using the telephone for years and may be very skilled - others may have developed bad habits.

Remember that, to begin with, you need to find out what are good telephone techniques and to practise these.

OBSERVATION

Observe people making telephone calls and either watch them without disturbing them or tell them that you are trying to learn about using the telephone.

MAKE BRIEF NOTES TO HELP YOU LATER. YOU CAN USE THE SPACE ON THESE PAGES FOR SOME OF YOUR NOTES IF YOU WANT.

Some of the points you may want to look for are:

PREPARATION

When the person picks up the telephone does he/she fetch

pencil and paper?

a telephone message pad?

any other papers or information he/she needs?

IDENTIFICATION

When the person picks up the telephone does he/she:

say"hello"?

give his or her name or number?

give the department or firm's name?

or say something else?

Which is the best thing to say? Why?

MANNER

Does the person speak:

loudly or quietly?

clearly?

briefly?

Is the person:

helpful?

abrupt?

polite?

RESPONSES

Are there common phrases people use?

For example:

Pardon?

Can you hold on please?

Who's speaking please?

I'm sorry, Mr Smith isn't here.

Can I take a message?

Can I have your name and number, please?

Could you repeat that please?

ACTION

If he cannot help the caller, does the person:

ask somebody else to take the call?

pass a message to someone else?

How does he/she know who to pass a message to?

NOTES

What information does the person need to pass on?

For example:

Who the caller is?

What s/he wanted?

When s/he called?

Does s/he check this information with the caller?

What does s/he do with it?

How does s/he pass it on?

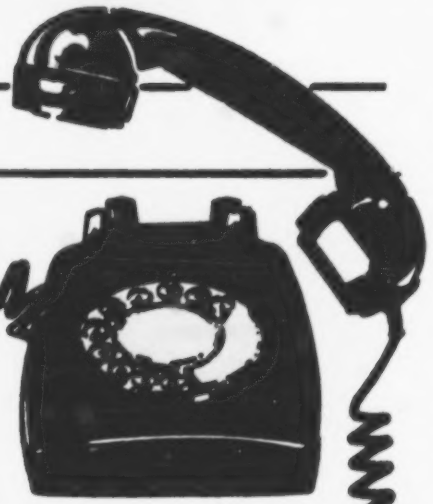
How does/he know who to pass it on to?

CHECKLIST

When you think you have watched enough people, make a checklist which will help you or another trainee to answer telephone calls in your work area.

Put down enough to make it helpful, but not to say so many things that it is too long to use. Try to put your points down in the order in which they would be used.

CHECKLIST



PRACTICE

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Try it in action by taking telephone calls yourself. When you feel confident about taking calls, review your checklist to see if you can improve.

When you have finished, discuss your checklist with your Supervisor.

Do you think this checklist would be useful to trainees in other work areas, or are calls handled differently?

Discuss with your Supervisor whether arrangements can be made for you to investigate what happens in other work areas.

What changes would you need to make to your checklist so that it could be used in any work area?

BEFORE YOU START

How long do you think it will take to carry out this Action Plan?

WHEN YOU HAVE FINISHED

How long did it take to carry out the Action Plan?

Was this more/less than you estimated?

Why?

TRAINEE REVIEW

These questions may help you to decide what to write.

What did you learn? Remember the PURPOSES or things that you could learn are listed on Page 3.

Were any parts of the Action Plan too difficult? Which ones? What did you do?

Were any parts too easy? Which ones?

What was the most interesting part of the Action Plan and why?

How could you follow up this Project? Does it connect with other Projects that you have done?

How could you use what you have learned in this Project in the future?

SUPERVISOR REVIEW

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Please refer to Supervisor's Notes.

Please read the questions included under Trainee Review.

Please complete the Project Record Form and discuss your assessment with the trainee before initialling it to show that you both agree with the assessment.

COMMENTS:

PROJECT RECORD FORM

PROJECT TITLE TAKING TELEPHONE CALLS WBP NO S/2 DATE

TRAINEE'S NAME SUPERVISOR'S NAME

WORK BASED PROJECT		NEEDED A LOT OF ASSISTANCE	NEEDED SOME ASSISTANCE	LITTLE OR NO ASSISTANCE		FURTHER TRAINING NEEDED	COMMENTS INCLUDING NO OPPORTUNITY	AGREED INITIALS	
TASK NO	CORE SKILLS ASSESSED			NEEDS MORE PRACTICE	COMPETENT			TRAINEE	SUPERVISOR
	finding out information, by observing people at work 6.3								
	planning the order of activities by writing a trainee checklist 9.1								
	deciding which category things belong to when observing someone answering the telephone 10.2								
	providing information to clients or colleagues by speaking to them on the telephone 7.1/7.2								
	providing information in writing by recording telephone messages 7.3								
	checking your progress in developing good telephone technique 11.1								
	using the telephone correctly COMPUTER LITERACY								